Workbooks

6 Steps to a successful implementation

Over the years we have successfully completed hundreds of CRM projects, helping clients turn their investment into real business outcomes. Using this experience, we have developed a unique and proven approach to implementing CRM.

During implementation, a critical stage in your success journey, our team will work with you to create deployment plans aimed at accelerating Time to Value, helping to get you up and running quickly, and gaining value from your solution as soon as possible. Our consultants have extensive experience and can provide change management advice, full implementation services, data migration management, user training and more. Our best practices and proven methodology will ensure strong and quick ROI for your business. And we'll make sure to work with you every step of the way to ensure that your CRM project is a success.

1. Planning

Select team, agree requirements & build plan

1. Select your project team

We recommend establishing a project team to manage and support the implementation, drawn from a mix of managers and users.

The project team should have a good understanding of the business processes in use today, and an awareness of any limitations. They should be prepared to suggest improvements where necessary, and will ultimately define the success criteria for the roll out of Workbooks.

2. Agree your business requirements

You are going to make a financial investment in a new Business Application, so let's be clear on the business objectives and the return on investment you expect.

3. Formulate a management plan

What are the most important KPIs for you to track so you can make better business decisions? Do you spend a lot of money on marketing, but don't know the ROI? Or do you have significant annuity revenues you need to track? Or are new business billings key?

If we are leading the implementation, we would typically run a requirements gathering workshop(s) with the key stakeholders in the project and the 'Power Users' to understand the business requirements and define how the system will be configured.

In addition we will define how any data migration will be undertaken and, where appropriate, produce a 'data map'.

The output of this phase typically includes a Requirements Document re-capping your Current Business Process, a high-level Workbooks Data Model and your Future Business Process (if changing.) It may also include a detailed worksheet.

4. Build a project plan

Any project that requires change needs project management. We would suggest building a project plan with key milestones, dependencies and identified resources. This way you can plan your key activities and dates, and keep the project on track. If one activity takes longer than expected, you are then better equipped to understand the impact on the rest of the project.

If the Workbooks implementation team is responsible for Project Management, then you can expect a detailed project plan to be produced, with regular (weekly or monthly) project meetings to track progress.

If your project is complex and has several phases, we may suggest program management to co-ordinate all aspects of the implementation. Project updates will also include details of the number of days delivered and the days remaining within your implementation budget.

2. Build

Configure the core, create PDF templates, automation scripts & integrations

The standard 'out of the box' setup typically includes:

1. Users and Groups
2. Permissions and Capabilities
3. Email Setup
4. Own Organisation and Tax Regime
5. Financial Years and Currencies
6. Pick Lists and Custom Fields
7. Custom Page Layouts and Record Templates
8. Simple Workflows
9. HTML and Email Templates
10. Customisation of the Standard Workbooks PDF Templates
11. Report Writing

Further optional enhanced implementation steps include:

Create new and bespoke PDF templates

Workbooks has a powerful PDF templating language which can be used to create new and bespoke pixel perfect documents.

Automation scripts

Workbooks provides a powerful capability to automate business processes and tasks using the Automation Engine and the Workbooks API.

Integrations

Including pre-built integrations, 3rd party and bespoke custom.

3. Migration

Data migration planning

Successful migration of data is often one of the few items on the critical path for a new system implementation.

At Workbooks we recommend the following approach:

Data migration planning

If you are migrating data from one system, your planning process will be fairly straight-forward. However, if merging data from multiple sources, consideration should be given to the data migration approach and we would recommend a Data Migration Planning workshop to develop the overall Data Migration Strategy.

Extract your data from your original systems

Your original systems may provide comprehensive tools to export your data in a CSV format. Products such as Salesforce.com do provide these kind of export tools.

Clean, de-duplicate and transform

If your data is in good shape, limited cleaning will be required and you may just need to transform the data into the right format for import into Workbooks.

Load into Workbooks

Importing data will be much more straightforward if it has been formatted carefully before the import begins. You can find lots of information about preparing your data on our Knowledge Base here.

4. Testing

User acceptance testing (UAT)

We recommend a period of time in which Power Users test the new system with your data by running through your key business processes.

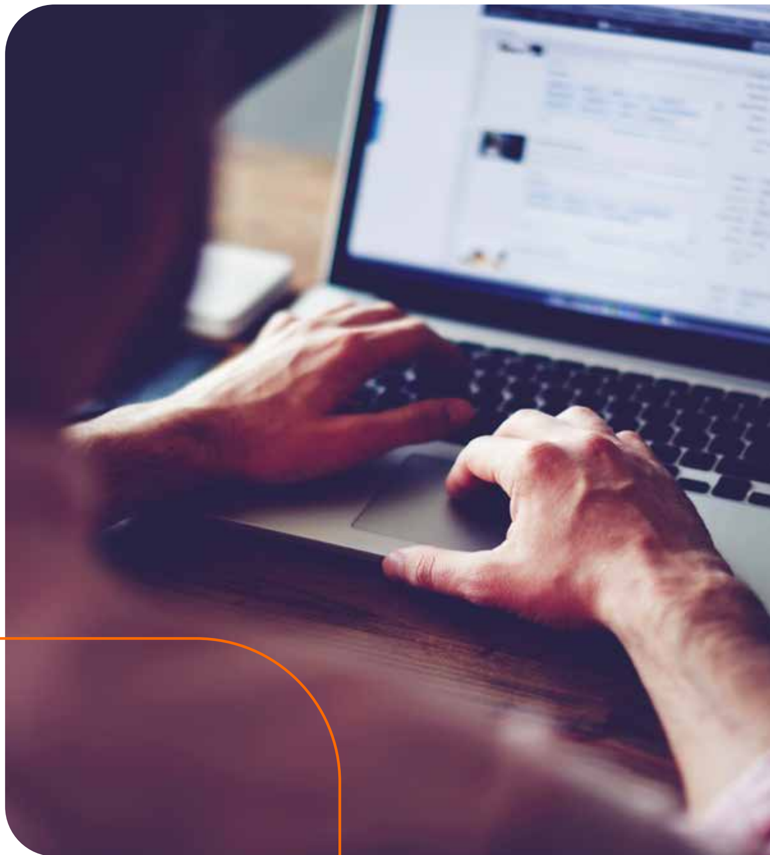
If this is your first CRM system and your requirements are simple, UAT might be an informal process. However, if you are implementing core business processes, such as order management or subscription management, we would recommend a more structured approach to testing. In this example we would recommend two sessions of UAT.

- **UAT1:** Walk-through and test each screen individually for page layouts, pick list values etc, within the Workbooks environment. This process is designed to familiarise users with the system and also ensure screens are configured in the right way.

- **UAT2:** End-to-end testing of the application from the beginning to the end of business processes being implemented, including data migration, integrations. This ensures that your Workbooks implementation really supports your business processes and workflows, including all external systems and processes.

Best practise would be to document each of your processes to ensure that users run through these processes from end-to-end. In addition you should ensure the appropriate management reporting information is available at the end of these processes.

The Workbooks Consultants can train power users/the project team prior to UAT, and they can facilitate UAT sessions, review issue lists and resolve prioritised issues, if required.



5. Training

End-user training

The Workbooks 'Web Desktop' is very user friendly and intuitive, which means your staff will quickly pick-up the application. However, user training always improves adoption and the value that the solution delivers to the business.

Workbooks can enable your organisation via three different training models:

- **Train-the-trainer**
- **End-user training (classroom or online)**
- **Hybrid of above**

Where budget allows, our preferred approach is to develop Client/Function specific Training Guides, prior to your End-to-End Testing so that the Training Guides can be tested along with the system.

This ensures that all the training scenarios and business process maps have been thoroughly reviewed by your project team and a small selection of end users prior to launching to the wider user community. We recommend that the Training Guides cover your specific business processes as well as the 'point-and-click' elements.

We also recommend that the Training Guides are loaded against your Organisation record in Workbooks and uploaded onto your Company Intranet. We also recommend that your on-going CRM Innovation plans include the regular review and update of the Training Guides.

Depending upon the scale of customisation and the level of change to your business processes, end users can be trained in half or full day sessions (half day is typically sufficient for most implementations).

We recommend users are trained in functional groups of 8-10 users (maximum), with their manager in attendance. We also recommend that the project sponsor or core project team members attend the training or record a short video to explain to the users being trained the importance of the program for the business.

With respect to location, we recommend booking a room large enough for 8-10 users which enables the Trainer to circulate around all users with ease, with sufficient internet connectivity, and preferably with a projector and/or whiteboard. We typically provide end-user training at your location if you have a suitable room.

We also recommend that your project sponsor or project leader ensures that all trainees are informed that they should completely clear their calendars, set their out-of-office etc. so that they are in the right frame of mind to focus on training without day-job interruptions. We also recommend where possible, that you provide users with links to a couple of our introductory videos, and ask them to ensure they log-in prior to attending the training. This helps reduce the amount of time they need to spend in training.

6. Go live

So far during your CRM implementation you have agreed your CRM requirements, built the system, migrated your data, tested your processes and trained all your users. Now you are ready to go live.

Final data migration

If data has been updated in legacy business systems during the setup and configuration of your new CRM system, you may need to re-run your data migration process to ensure that Workbooks has the most up to date information. If you planned your data migration well, this should be a simple, repeatable process.

Hand-hold users during go-live

During the first few days of go-live, we would recommend staying close to the users and ensuring that they are learning and using the system. The training will have helped, but different people learn at different rates and deal with change in different ways, so supporting those users during the early days of the project will ensure that any concerns are addressed immediately and that the roll-out gains momentum.

Make the team of 'Power Users' responsible for this and, if required, enlist the help of a Workbooks consultant.

Continuous improvement

Once you're live and the system is delivering the benefits you expect, you may find that employees using Workbooks day to day, will have ideas on how you could refine or improve the system. Take the time to review these suggestions and see what improvements can be made.